Contents

About This Guide .................................................................................................................................................. 5
What's New in Release 7.0? ................................................................................................................................. 5
   Architectural Enhancements .......................................................................................................................... 5
   New Features.................................................................................................................................................. 5
   Technology Enhancements............................................................................................................................ 6
   Client Enhancements................................................................................................................................... 7
Requirements ....................................................................................................................................................... 7
MaxACD 7.0 Architecture .................................................................................................................................. 7
Web-Based Configuration Portal.......................................................................................................................... 8
   The Menu Bar ............................................................................................................................................... 8
New Features....................................................................................................................................................... 10
   Web Chat ................................................................................................................................................... 10
      The Agent's Perspective ............................................................................................................................ 11
      Behind the Scenes .................................................................................................................................. 12
      Parameters Not Available for Chat Workgroups .................................................................................... 12
      Chats in MaxAgent .................................................................................................................................. 14
      Chats in MaxSupervisor ............................................................................................................................. 14
      Chat Criteria in MaxReports ..................................................................................................................... 15
      Chat Data in ACR...................................................................................................................................... 15
Workgroup and Agent Announcements ............................................................................................................ 15
   Configure Agent Personal Announcements.................................................................................................... 16
   Copy Personal Announcement Files to Other Workgroups............................................................................ 17
New License Design ......................................................................................................................................... 17
Outbound Workgroup Campaign Caller ID ....................................................................................................... 18
   Configure Campaign Caller ID .................................................................................................................... 19
   How Agents Use Campaign Caller ID .......................................................................................................... 20
   Caller ID Precedence ...................................................................................................................................... 20
Redundancy ......................................................................................................................................................... 21
   Enabling Redundancy .................................................................................................................................. 21
   Manually Switch to the Standby Server .......................................................................................................... 21
Technology Enhancements ............................................................................................................................... 22
   Administrators and Workgroup Supervisors ................................................................................................. 22
      Adding a User as an Administrator or a Workgroup Supervisor .............................................................. 22
      Enabling Workgroup Supervisor Privileges for a Workgroup .................................................................. 23
Outbound workgroup calls ........................................................................................................... 24
Call Recording After Transfer .................................................................................................. 24
Copy Holidays from one Holiday Profile to Another ............................................................. 24
Client Enhancements .................................................................................................................. 25
  MaxReports Enhancements ...................................................................................................... 25
  MaxAgent Enhancements ......................................................................................................... 25
  MaxAgent Transfers ................................................................................................................... 26
  MaxSupervisor Enhancements ................................................................................................. 27
  MaxInsight Enhancements ........................................................................................................ 27
  VRManager Enhancements ...................................................................................................... 27
  Windows 10 Client Support ...................................................................................................... 28
Parameters from Release 6.5.8 No Longer Available ............................................................... 28
Operational Limitations ................................................................................................................ 30
AltiGen Technical Support .......................................................................................................... 30
About This Guide

This guide describes the new features and changes in MaxACD Release 7.0. This information can also be found in the MaxACD Administrator Manual or the corresponding client user guide.

Related documentation can be found on the AltiGen MaxACD web site: http://maxacd.com/maxacd-for-lync/, on the Support tab.

What’s New in Release 7.0?

Following is an overview of the enhancements that have been added to MaxACD since Release 6.5.8:

Architectural Enhancements

- **UCMA-based native application.** Unlike the previous release, MaxACD Release 7.0 is a Microsoft Lync/Skype for Business UCMA-based trusted application.
- **Web-based configuration portal.** MaxAdministrator is now a web-based configuration tool. The GUI has been updated to encompass chat sessions as well as voice calls. See page 8 for a discussion of the new interface.
- **Skype for Business 2015 support.** Release 7.0 supports both Lync 2013 and Skype for Business 2015.
  
  **Note:** MaxAgent supports the Lync 2013 client and the Skype for Business client.
- **Exchange integration for voicemail.**
- **Active Directory based users.** Release 7.0 supports search and add AD domain users and uses Windows domain credentials for authentication.
- **MaxACD diagnostic tool** (MaxACD Diag). MaxAdministrator from Release 6.5.8 is now available to superusers as a troubleshooting tool; no setting changes can be made from this application.

New Features

- **Web chat.** MaxACD 7.0 includes a new Web Chat feature. Once this Web Chat feature has been deployed, you can specify a workgroup as a Chat workgroup. Customers can initiate a chat session via a link on your company’s web page or via the user’s Lync or Skype for Business application. See page 10 and refer to the MaxACD 7 Web Chat Deployment Guide for setup instructions.
- **Workgroup and agent announcements.** You can customize announcements to play or display when an agent answers a call or accepts a chat request. See page 15.
- **New license design.** To accommodate the new Web Chat feature, the agent license design has changed.
- **Outbound Workgroup Campaign Caller ID.** A new campaign-based Caller ID feature allows workgroup agents to select a caller ID to be display when making outbound workgroup calls. See page 18.
- **URI routing.** With this release, you can add URI routing rules and specify a DID number of a SIP URI for incoming calls and forwarding targets. A PSTN incoming call made to a DID number or a SIP incoming call destined to a specific SIP URI can be routed from the Lync/Skype for Business server to the MaxACD server using Application Endpoint (AEP). Administrators may add URI Routing entries in the MaxACD server, and specify the DID number or SIP URI for incoming calls and its forwarding target, an IVR, a Workgroup, a
SIP URI, or a voicemail. Outbound workgroup calls are routed out via the Lync/Skype global dialing plan instead of the dial plan associated with the agent.

**Tip:** If you have a voice URI routing rule, and want to create a chat rule with the same name, click the **Add Media** button and configure the new rule. The names stay coordinated; in other words, if you rename one of the routing pairs, the other rule is automatically renamed for you.

Administrators can also choose to display a SIP URI AEP as a contact which can be searched and added by Lync/Skype for Business clients. When a Lync/Skype for Business client calls this AEP contact, the call is routed to MaxACD’s URI Routing engine, and is forwarded to the configured target.

Within the Administrator portal, there are many places where you can route a call or chat to a SIP URI. For convenience, you can either type the entry or click the small button beside the field to search for the appropriate user.

- **Redundancy.** MaxACD 7.0 supports redundancy; you can have a primary MaxACD server plus a secondary MaxACD server. Once you have configured the redundancy feature, if the primary server fails, the secondary server takes over. See page 15.

### Technology Enhancements

- **Two levels of administrator privileges.** Administrators and WG Supervisors. See page 22.
- **Call recording enhancement.** In MaxACD 7.0, recording after an ad-hoc transfer may continue if some specific requirements are met. See page 24 for details.
- **Agent login no longer resets Ready/Not Ready state.** In prior MaxACD releases, if the agent is in *Not Ready* state, logging into a workgroup would changes the agent state to *Ready*. In Release 7.0, logging into a workgroup no longer changes the agent *Ready/Not Ready* state.
- **Workgroup voicemail enhancements.** MaxACD 7.0 supports WMA, MP3, and other Wave media formats. Voice messages are stored on the Exchange server and are synchronized to the MaxACD server.
- **Copy holidays from one profile to another.** You can now copy a set of holidays from one Holiday Profile to another; this alleviates the need to re-enter holidays for each profile.
- **Voicemail enhancements.** In this release, either a phone number or a SIP URI can be configured as the message notification target. Also, although the extension-based voicemail feature is not supported in MaxACD 7.0, users access voice messages in their mailboxes via a Lync or Skype for Business client or from their Outlook client. Use Exchange to create the voicemail account for each workgroup and associate it with a Lync/Skype Enterprise Voice user account.
- **SNMP enhancements.** A new SNMP trap will report if a MaxACD server component is up or down. Additional traps are sent under the following conditions:
  - MaxACD Application server status is changed to up
  - MaxACD Application server status is changed to down
  - MaxACD Proxy server status is changed to up
  - MaxACD Proxy server status is changed to down
  - Redirector server status is changed to up
  - Redirector server status is changed to down
• **Skill levels enhancement.** Workgroups can now have up to 20 skill levels. Each level has its own escalation time.

To accommodate this expansion:

- The parameter **Workgroup> Call Handling > Queue Call Priority Score** has been changed to \((21 - \text{Skill Level}) \times \text{Skill Requirement} + (10 - \text{Priority}) \times \text{Priority Assignment}\).
- The Priority assignment value has been changed to 1 to 20.
- The range of skill level assignment in URI Routing, Caller ID Routing and IVR has also been changed to 1 to 20.

• **Forced account codes.** You can configure an agent’s account so that when the agent is making an outbound (voice) call, a panel opens to prompt for an account code. The call will not be initiated until the agent specifies an account code.

• **Workgroup Queue consolidation.** The **Basic and Advanced Queue options** in MaxACD 6.5.8 have been merged into a single tab.

• **Phrase management enhancement.** MaxACD 7.0 allows Administrators to upload custom voice phrases, custom chat phrases, and a music file. To upload phrases, open the IVR menu and choose **Phrase Management**. From there, you can add both audio phrases and chat HTML phrases. You can also add and upload style sheets for chat agent announcement phrases.

• **Active X control API support.** Although the API set is preserved, its underlying communication mechanism has been changed. A TCP server has been added to MaxAgent such that the custom applications using the client SDK can establish a TCP connection to MaxAgent to send commands or get events. Only TCP connection from the local host is supported. Remote TCP connection will be rejected.

• **SDK.** MaxACD 7.0 supports the API’s necessary to perform workgroup RTM, line events and agent state monitoring. MakeCallEx method supports making outbound call through server ring back but require the agent to answer the call through the SFB client. Drop API supports hanging up the call.

### Client Enhancements

Refer to the section beginning on page 25 for a list of enhancements for MaxAgent, MaxReports, MaxSupervisor, MaxInsight, and VRManager.

- Windows 10 is now supported on MaxAgent, MaxSupervisor, and MaxInsight.
- For client systems that are not already running .NET 4.5 (such as Windows 7), you must install .NET 4.5 before you upgrade the clients on those systems.

### Requirements

Refer to the *MaxACD 7.0 Deployment Guide* for a full list of MaxACD 7.0 requirements.

### MaxACD 7.0 Architecture

Unlike the previous release, MaxACD Release 7.0 is a Microsoft Lync/Skype for Business UCMA-based web application.

There are four major components included in this release of MaxACD:
- **MaxACD AS** – The MaxACD Application server, which provides IVR and ACD feature services.
- **MaxACD Proxy** – A UCMA-based application service residing in a Trusted Application Pool. MaxACD Proxy handles calls using the UCMA API, and it interacts with MaxACD AS for Workgroup and IVR call processing.
- **CWS** – (Configuration Web Service) A web-based program, the MaxACD Administrator Portal, is used for feature provisioning and is used by IT administrators and workgroup supervisors. This application obtains company and Lync/Skype user information from Active Directory (AD).
- **CWS DB** – A configuration database hosted by a MS SQL server or SQL Server Express. MaxACD Proxy, MaxACD AS, and the MaxACD Administrator Portal all read configuration settings from the CWS DB.

Refer to the *MaxACD Deployment Guide* for a diagram of the system architecture.

### Web-Based Configuration Portal

The configuration portal includes a menu bar at the top. Each menu offers various sub-tabs. On most tabs, you will click an object (a user, a workgroup, a routing rule, and so on) from a list on the left, and adjust its parameters on the right.

#### The Menu Bar

The Menu bar is at the top of the window. It contains menus for the main aspects of the system.
• **Admin tabs** – Where you configure system URI information, set up Caller ID routing, manage Administrator accounts, and create virtual extensions. You also configure Web Chat details here.

• **System tabs** – Where you configure the general aspects of MaxACD, including account codes, multilingual settings, redundancy, and SNMP traps.

• **User tabs** – Where you configure user accounts. Here, you can assign users to workgroups and grant monitoring privileges.

• **IVR tabs** – Where you configure IVR settings, manage phrases, and set language options.

• **Workgroup tab** – Where you configure voice and chat workgroups, including group membership, business hours, skill-based routing, handling options, and queuing options.

• **Work Hours tab** – These tabs are where you configure your business’s daily work hours and set up company holiday profiles and associated routing rules.

• **License tab** – Where you can view the MaxACD licenses in use and the total license count for each application.
• **Settings tab** – Where you can change the password for the Administrator. Here, you can also retrieve the password for the CSWDB database.

• **Logout button** – Where you log out of the MaxACD Administrator portal.

In the upper right corner, the **About** button provides the version and the build number of the MaxACD system, and the **Help** button provides information about the current tab.

New Features

This section describes some new features that have been introduced in Release 7.0.

Web Chat

In Release 7.0, workgroups can be configured as either Voice workgroups or Web Chat workgroups.

Workgroups cannot handle both types of media; they can handle one or the other.

With Web Chat workgroups, customers and/or associates can chat with agents in those workgroups either by clicking a “Chat” link on your web page or via their Lync or Skype for Business client.

In order to chat with an agent, the MaxAgent desktop must have Microsoft Silverlight installed.

In order to deploy chat workgroups, you must have the correct licenses and you must deploy the Web Chat feature on your server; refer to the *MaxACD 7.0 Web Chat Deployment Guide* for instructions.
The general process of deploying chat groups is as follows:

1. Deploy the Web Chat feature (follow the steps in the *MaxACD 7.0 Web Chat Deployment Guide*)
2. Configure chat phrases, introductions, and announcements as needed.
3. Create Chat workgroups and configure their members, their routing options, session handling options, and other parameters, just as you have done with voice workgroups in the past.
   
   **Tip:** If you have a voice workgroup and want to create a chat workgroup of the same name, click the *Add Media* button and configure the new workgroup. The names stay coordinated; in other words, if you rename one of the workgroup pairs, the other group is automatically renamed for you.
4. Assign Chat Media licenses to agents who will be members of Chat workgroups.

### The Agent’s Perspective

Some notes about agents in multiple workgroups:

- Agents can be members of multiple workgroups; this means that a user may be a member of both multiple voice workgroups and multiple chat workgroups.
- An agent can handle only one voice call OR chat sessions simultaneously. In other words, an agent cannot handle a voice call at the same time as handling a chat session.
- An agent can handle multiple chat sessions simultaneously.
- There is a user setting within the Administrator Portal where admins can set the maximum number of concurrent chat sessions that the system will allow the agent to handle. (On the *User > Group Membership* tab.)

Once an agent reaches the maximum chat session count specified in the Administrator Portal, then system will not distribute any more chat sessions.

Agents can also temporarily set their Lync/Skype status to *Not Ready,* to prevent the system from sending any more chat sessions to them.

Agents (and administrators) can configure chat Auto-answer settings, just as with voice calls (on the *User > Group Membership* tab). With incoming chat sessions, there will be no ringing dialog box – the chat is answered automatically.

You can display an agent’s name to chat customers by entering it into the *Display Agent Name* field (on the *User > General* tab).
Behind the Scenes

Chat sessions are considered the same as voice calls, in that they can be routed to an available agent according to workgroup call distribution logic. Chat sessions can be sent to the workgroup queue if no agents are available, just as with voice calls. Chat sessions can also have priority queueing and skill based routing.

A chat session reaches the workgroup queue in one of two ways: via a link on a web browser or via a Lync or Skype for Business client. Following is an overview of the process:

1. A web user clicks a link on a web page hosted on the company web server.
2. The web user is redirected to the Web Chat server. The user fills out a web form then clicks the Chat button.
3. The web client initiates an HTTPS chat session to target a specific SIP URI using Web SDK.
4. The Lync/Skype for Business server routes the chat session to the MaxACD Proxy.
5. The MaxACD Application server and Lync Proxy server collaborate to queue this chat session and find an available agent.
6. MaxAgent opens a dialog box to “ring” the available agent, and the agent accepts the chat request.
7. The Proxy server creates a conference bridge and connects the agent and the customer.
8. MaxACD logs the chat session details and the Web Chat server logs web form data into the CDR database.

AltiGen has provided a template for a web front-end button, which customers or associates can click to request a chat session. For details, refer to the MaxACD Web Chat Deployment Guide.

Parameters Not Available for Chat Workgroups

**Important:** Make sure that the handling/forwarding targets support the same media type as the workgroup that you are configuring. For example, make sure that chat sessions are forwarded to chat workgroups and not to voice workgroups.

All of the MaxACD voice call features apply to Chat workgroups, with the following exceptions:

- Parameters on the *In Queue IVR* tab, the *Call Recording* tab, and the *Notification* tab
- Outbound chats
- Coaching
- All Available Members (in *Intra Group Call Distribution*)
- Account Code
- Call Recording
- Multi-Lingual
- Voicemail
- Call Hold/Consultative Transfer
- Message Notification
- Caller ID Routing
- Number of seconds before handling
Parameters Modified to Support Chat Sessions

- **URI Routing**
  - URI Routing support for chat media has been added, where both voice and chat media may share the same SIP URI
  - For call forwarding, you can forward to chat workgroups, chat IVR, or a SIP URI

- **IVR**
  - IVR for chat media is added, where both voice and chat may share the same SIP URI
  - Allow only Advanced Call Router actions

- **Holiday**
  - Chat-based holiday entry is supported so that voice and chat media can take different routes
  - For call forwarding, chat workgroups support chat IVR and SIP URI forwarding targets

- **Phrase Management**
  - Support HTML-based text phrases
  - Inline style sheet support for phrases to allow easy system message text style changes

- **Workgroup**
  - Chat workgroup's call forwarding targets are chat workgroups, SIP URI, and Announcement Message
  - Pick up a chat from the queue
  - Chat supervision for silent monitoring and barge-in
  - Added incoming chat session related statistics to the agent’s workgroup RTM data. This can be displayed by both MaxSupervisor and MaxReports
  - Greeting message display to the customer when the chat is put in the queue
  - Answer announcement text to display a message to the customer when the agent answers the chat request
  - Chat session Disconnect Announcement is added to let the customer know that the chat session has ended.
  - Wrap Up state is invoked only when the last chat session is disconnected

- **Handling:**
  - The *Ring All Available Members* option in Intra Group Distribution is not available
  - Busy handling – You can forward to the workgroup queue, to another workgroup, to a SIP URI, or play an announcement
  - No Answer handling – You can forward to the next group member, to another workgroup, to a SIP URI, or play an announcement
  - Set RNA Agent Log Out – You can log the agent out of this workgroup if a chat goes unanswered
  - RNA Not Ready – You can set the agent’s state to *Not Ready* if a chat request is not answered
- Forwarding: You can forward the chat to another workgroup, to a SIP URI, or play an announcement.

**Queue Management Options for Chat Workgroups**
- Queue overflow triggers are calculated based upon chat queue data such as the number of chat sessions in the queue, the expected queue wait time, and the service level.
- If the *Queue Length Exceeds* option is selected, as soon as the number of queued chat sessions exceeds the limit that you specify, chat sessions will be overflowed.

**Chats in MaxAgent**
The GUI in the MaxAgent client has been updated to support web chats. Note the following:
- Web chat entries appear in the Call Window, just as voice calls do.
- The DND setting in the Lync/Skype for Business client applies to both voice calls and chat sessions.
- Agents can enable or disable a chat Auto-Answer feature, which is similar to the voice call Auto-answer parameter.
- When an agent has multiple chats open at the same time, they will appear as tabs in the window.

**Chats in MaxSupervisor**
The GUI in the MaxSupervisor client has been updated to support web chats. Note the following:
- A new column in WG view and Agent view shows the media type of the session (chat or voice).
- The DNIS column changes to DNIS/URI.
- Display agent’s incoming chat statistics, including Total WG Answered, Total Chat Time, Average Chat Time.
• Display agent’s chat Wrap Up statistics, including Total Number of Wrap-Up, Total Wrap-Up Time, and Average Wrap-Up Time
• Form data HTML page can be viewed by clicking Max Supervisor’s queued call entry or by clicking agent’s chat state entry
• Display number of concurrent chat sessions for each agent

Chat Criteria in MaxReports

In the following pages, added Voice and Chat options in the search page, to allow the user to view the statistics of selected media types.

• Report 1201, Agent Performance Summary
• Report 1202, Agent WG & Direct Call Summary
• Report 3201, DNIS Call Summary
• In Report 3101, DNIS Call Details, added Media Type field

Chat Data in ACR

Advanced Call Router has been enhanced for chat data.

• Support for chat media call routing through form data tag and value
• Query CDR database using Customer Session ID to retrieve form data
• Form data routing rules configuration
• Routing rule decision based on the text of form data tags

Workgroup and Agent Announcements

Another new feature in Release 7.0 is the ability to play or display announcements after a call or chat has been accepted.

• For voice calls, both the agent and the caller can hear the announcement.
• For chat sessions, both agent and customer/associate can see the phrase in the chat window.

Workgroup announcements are configured on the Workgroup > Session Handling tab.

You have several options for playing or displaying introductions for customers and associates when beginning chats or voice calls.

• To play/display a workgroup-based announcement, check the Enable Answer Announcement option and choose the appropriate phrase from the list. The default for this pulldown menu is N/A (no announce-
ment will play/display). Refer to the *MaxACD Administrator Manual*, in the IVR chapter, for instructions on uploading phrases.

- **To play/display the agent’s personalized announcement instead of the workgroup-based announcement, also check the Use Personalized Agent Announcement Instead if available option.** If the agent handling the call or chat does not have a personalized announcement configured and enabled, then the workgroup announcement will play/display instead.

- **Disconnect announcement** – (For Chat workgroups only) You can also display a disconnect phrase, to let customers know that the chat session has ended. Check the option and select a phrase from the list.

To disable announcements for this workgroup, clear the Enable Answer Announcement option.

**Configure Agent Personal Announcements**

Agents can have one custom announcement phrase per workgroup.

To configure an agent’s personal announcement,

1. Open the **User > Group Membership** tab and select the agent.
2. Click the button beside **Personalized Answer Announcement**.
3. In the next window, select either **Voice** or **Chat**.
4. Click **Choose File** and browse to the appropriate phrase. Make sure you choose an appropriate file format: .WMA files for Voice announcements; .HTM files for Chat announcements. Click **OK**.
5. Once the file has been uploaded, click **OK**.
6. Check the option **Enable Personalized Answer Announcement** to enable this feature.
7. When you have finished configuring this agent, click **Done**.
Announcement and Disconnect Phrases

- Phrases should be HTML files (<phrasename>.htm)
- To embed the agent’s first and last name into the phrase, use %f (first name) and %l (last name) in the phrase (does not apply to the Disconnect phrase).
- You can add and edit style sheets; select IVR > Phrase Management, click the button beside Inline Style Sheet, and update or create style sheets as needed.

Following is an example of a chat phrase:

```
Use DEFAULT inline style sheet
Set font size 12px
Phrase text
```

Copy Personal Announcement Files to Other Workgroups

Once you upload an announcement file for an agent, you can copy that file to other workgroups that agent belongs to, if they are the same media type. For example, if an agent belongs to three different chat workgroups, you can upload the .HTM file once, then copy that file to the other two chat workgroups:

1. In the upper section of the Personalized Answer Announcement panel for the user, highlight the workgroup containing the uploaded file.
2. Check the checkbox for any other workgroups that also will use this announcement file.
3. Click the Copy To button. The file will copy to the workgroups that you selected.

Note: You will not be able to click another agent in the Names list while you are in this panel. When you have finished configuring announcement files for the current agent, click Done. You will return to the User > Group Membership tab, where you can select another agent to configure as needed.

New License Design

To accommodate the new Web Chat feature, the licenses in MaxACD 7.0 have been modified. The Agent license in previous releases of MaxACD is now the Agent Basic license. This license includes Voice media.

To assign a chat license or voice license to an agent,

1. On the User menu, select General.
2. Select the user in the Name list.
3. On the right, select the Assign Agent Basic License option.
4. Select whichever media license applies to this agent. If an agent will support both voice and chat sessions, you can purchase a Chat Media license.
You can see which agents have voice and/or chat session licenses by looking on the License tab.

Considerations:

- When you select the **Assign Agent Basic License** option, you must also select one of the media options. If you do not assign a media option, MaxACD will remind you to do so.
- If you click Edit and change license assignments, the system will validate your selections when you click **Ok**.
- If you remove a media license (either Chat or Voice) from an agent, the system will automatically remove that agent from the corresponding workgroups. For example, if you remove a Chat media license from an agent, the system will automatically remove that agent from all Chat workgroups.

**Outbound Workgroup Campaign Caller ID**

In MaxACD 7.0, workgroup agents can choose from a list of campaign-based Caller IDs to display when making outbound workgroup calls.

The administrator or the Workgroup supervisor can configure a list of Caller IDs for a workgroup. The agent then selects from the Campaign Caller ID list when logging into an outbound workgroup. Afterwards, all the outbound workgroup PSTN calls made by this agent will display the selected Caller ID.
Configure Campaign Caller ID

Administrators and Workgroup supervisors can configure this list on the Workgroup > Session Handling tab. To configure the list,

1. Choose the user in the left panel.
2. Click the button in the Outbound Workgroup section beside Campaign Caller ID.

You will see a list of any campaigns that have already been configured.

3. To add a new campaign, click Add Campaign Caller ID, then enter a descriptive name, the caller ID that will be associated with that name, a caller name that will be associated with the campaign, and the SIP URI.

   Note: Only digits are supported in the Caller ID field; do not enter dashes or any other characters.

To update a campaign, click the Edit button beside it.

If you need to delete a campaign, click the Delete button beside it.
How Agents Use Campaign Caller ID

When agents log into MaxAgent, they are presented with a Workgroup login screen. There, agents select an outbound workgroup.

Once they select the outbound workgroup, the Campaign Caller IDs that have been configured for that workgroup are available from the list. Agents choose a Campaign name from the list.

When the agent makes an outbound workgroup PSTN call, MaxACD sends the selected Campaign Caller ID to the Lync/Skype for Business Server. Note that the caller ID may not be delivered to the remote end device if the gateway and/or the carrier involved blocks it.

Administrators and Workgroup supervisors must enable the Allow Agent to Change Outbound Workgroup option (on the Workgroup > Group Membership tab) in order to enable Campaign caller ID feature.

If an administrator or Workgroup supervisor changes or deletes the Campaign Caller ID being used by an agent, the Campaign Caller ID setting for the agent is reset to N/A. In addition, if MaxAgent is running at the time of the deletion or change, MaxAgent will show the agent a warning panel that allows the agent to choose a new Campaign caller ID.

Caller ID Precedence

Following is the precedence for the Caller ID that is sent for the outbound call:

1. The Campaign Caller ID is set, if it has been configured.
2. If no Campaign Caller ID has been chosen, the User Caller ID will be sent.
3. If no agent Caller ID was chosen, the agent’s Line URI will be sent.
4. If none of the previous options were chosen, the System Main Number will be send.
Redundancy

For full details on deploying a redundant MaxACD system, refer to the *MaxACD 7.0 Deployment Guide*.

MaxACD supports system redundancy (a Redundancy license is required).

Two Softswitch servers must be configured. When the active server goes down, the standby server takes control. The change is transparent to direct connected calls.

After you configure redundancy, the second server will get the license information from the first server.

There are two primary processes involved in configuring redundancy:

- During the deployment of MaxACD, within the installation wizard, choose **Redundancy** instead of **Single Server**, and enter the IP address of both servers. You must assign the same System ID number to both systems during installation. For full details, refer to the *MaxACD 7.0 Deployment Guide*.
  
  If you did not choose **Redundancy** during your initial deployment, run the MaxACD installation program on the system again, and choose **Redundancy** instead of **Single Server**.

- After deployment, within MaxACD Admin, you must enable redundancy. You do this on the **Redundancy** tab of the **System** menu.

Enabling Redundancy

1. On the **System** menu, choose **Redundancy**.
2. Select the checkbox **Enable Redundancy**.

This tab shows the current state of both servers. It also shows the date and time of the most recent switchover, and the reason for that switchover:

- **Automatic** – The switchover was automatically performed by the system, in response to a hardware problems or other issues

- **Manual** – An administrator manually switched to the standby server by clicking **Manual Switch Over**.

Manually Switch to the Standby Server

Be aware that all active WG calls and chat sessions will drop after a switchover. Voicemail messages will stop recording, CDRs will be dropped, and daily RTM statistics will be reset.

If you need to manually switch to the standby server,

1. On the **System** menu, choose **Redundancy**.
2. Click **Manual Switch Over**.

   **Note:** If the active system needs to be shut down for maintenance, you should manually switch control to the standby server before you shut down the active server.

---

### Technology Enhancements

The following features of MaxACD have been expanded.

#### Administrators and Workgroup Supervisors

There are now two levels of administrative users in MaxACD: Administrators and Workgroup Supervisors.

- **Administrator users**, who have full rights to configure the system (including all configuration options found on the **System > Server** tab)
- **Workgroup Supervisors**, who have rights to manage specific workgroups, and also edit various settings for workgroup members

**Considerations:**

- Workgroup Supervisors do not have access to system configuration settings.
- Workgroup Supervisors cannot add or delete workgroups.
- Workgroup Supervisors can redirect calls and chat sessions, and can change the priority of calls and chat sessions, using MaxSupervisor.
- Workgroup Supervisors can edit workgroup users’ General, Group Membership, and Monitor List tab options; only those agents who belong to one of the Supervisor’s workgroups will appear on the User tabs.
- Workgroups can have multiple Supervisors.
- Workgroup Supervisors can manage multiple workgroups.
- Each workgroup has its own supervisor control option (enable/disable), independent of other workgroups. The setting is found on the Workgroup > Queue tab.

#### Adding a User as an Administrator or a Workgroup Supervisor

To specify a user as an Admin or a Workgroup Supervisor,
1. Select **Admin > Admin User**. You see the Admin accounts that have already been configured in MaxACD.

2. Click **Add New User**.

3. Search for the specific user that you want to grant Admin or Workgroup Supervisor privileges. There are several ways to search for a user. For example, you can search by first name or last name, without adding spaces in the search criteria.

4. In the search results, click the user’s name.

5. When you return to the **Admin User** tab, several fields automatically populate for you. Select either **Admin** or **Workgroup Supervisor**.

6. If you selected **Workgroup Supervisor**, select which workgroups this user can manage.

To change privileges for a user,

1. Select **Admin > Admin User**. You see the Admin accounts that have already been configured.

2. Click **Edit** beside the name of the user that you want to update.

3. Change the privilege type and/or assigned workgroups as needed. Click **OK**.

To remove an Admin user’s privileges,

1. Select **Admin > Admin User**. You see the Admin accounts that have already been configured.

2. Click **Delete** beside the name of the user. The user remains in the MaxACD system, but no longer has administrator privileges.

**Enabling Workgroup Supervisor Privileges for a Workgroup**

To specify whether a specific workgroup can allow its Workgroup Supervisors to redirect calls and chats, and adjust call and chat priority,

1. Select **Workgroup > Queue**.

2. Select the workgroup in the Name panel.
3. Select the checkbox **Allow Redirect/Change Priority**.

![Supervisor Queue Control](image)

Outbound workgroup calls.

In MaxACD 7.0, agents can make outbound workgroup calls from Lync/Skype for Business contacts by right-clicking the contact entry in the Skype for Business client and choosing **Outbound Workgroup Call**. The same validation logic to check whether the agent has privileges to make outbound calls from the dialer textbox applies to this outbound call method.

![Outbound Workgroup Call](image)

Call Recording After Transfer

In earlier releases of MaxACD, workgroup call recording stopped after the call was transferred. In MaxACD 7.0, recording after an ad-hoc transfer can continue if some specific requirements are met.

An "ad-hoc transfer" occurs when an agent invites another agent to the conference bridge and then hangs up the call. The customer and the newly-added agent then continue to talk on the conference bridge.

If the invited agent is a Lync/Skype for Business user who has been configured in MaxACD, then call recording will continue after the original agent disconnects from the call. Otherwise, call recording stops.

Copy Holidays from one Holiday Profile to Another

In this release, you can copy a set of holidays from one Holiday profile to another profile of the same media type.

**Note:** When you copy holidays from another profile, not only the holiday names and dates will be copied, but the other configuration details for each holiday will be copied as well. In other words, the settings in the **General** and the **Work Hours During Holiday** section for each holiday will be copied. Because the original routing rules may not be appropriate for the current profile, check the configuration carefully and modify the rules as needed after you copy holidays from another profile.

To copy a set of holidays to a profile:
1. Select **Work Hours > Holidays**.

2. In the Holiday Profiles panel, select the profile that you want to update.

3. In the **Copy holiday from** section near the bottom of the tab, open the menu and select the profile that includes the holidays that you want to copy into this profile. Click **Copy**. You will be warned that this action will overwrite any existing holidays in that profile.

4. After the holidays are copied into this profile, make sure that you check and adjust the routing rules and other parameters as appropriate.

**Note:** If you are creating a new profile, you must first save the new profile, and then copy holidays from another profile.

---

### Client Enhancements

In MaxACD Release 7.0, names are now the primary identifier for workgroups (in previous releases, a workgroup number was the primary ID), as well as for users, IVRs, and virtual extensions.

### MaxReports Enhancements

Refer to the **MaxReports Manual** for full details.

- Added Logout Reason description and logout duration to Report 1101 - Agent Activity Event
- Added Total Logout duration to Report 2202 - Workgroup Agent(s) Performance Summary
- Added Total Ring Time (RT)and Avg Ring time (Avg RT) to Report 2206 - Workgroup Inbound Calls Wait Time Summary
- Added DNIS description and Filter by DNIS Table option to Report 3101 - DNIS Call Detail Report and Report 3201 - DNIS Call Summary
- Added media type selections (voice, chat, or both) to reports
- Added shift time to some report selection criteria

### MaxAgent Enhancements

- **Agent login does not reset Ready/Not Ready state.** In prior MaxACD releases, if the agent is in Not Ready state, logging into a workgroup would change the agent state to Ready. In Release 7.0, logging into a workgroup no longer changes the agent Ready/Not Ready state.
- Enhanced call hold, transfer (see the next section), and conference operations. Inbound Lync/Skype for Business PSTN DID calls and SIP URI sessions are selectively routed to MaxACD:
  - PSTN DID
  - SIP incoming call
  - SIP URI

  Outbound workgroup calls are routed out via the Lync/Skype for Business dial plan associated with the agent.

- Agents can now handle Web Chat sessions; the GUI has been expanded with a window for this.
- When agents make outbound calls, a panel can now open to prompt for an account code before the call can be placed.
- MaxAgent users now log in using a UPN and a Windows domain password.

MaxAgent Transfers
This release includes various enhancements to the process of transferring calls.

Workgroup call transfers must now be initiated from MaxAgent.

There are two types of transfers:

- **Attended transfer** – Agents transfer the call directly, without speaking with the target party beforehand (in earlier releases, this was referred to as a *Blind* transfer)
- **Consultative transfer** – Agents call and speak with the target party before releasing the call (in earlier releases, this was referred to as a *Supervised* transfer)

**Attended Transfers**
To make an attended transfer,

1. The agent right-clicks the active call in the Call Panel and chooses **Attended Transfer**.
2. The agent then chooses the target and clicks **Transfer**. The target can be a contact, an IVR, a voicemail mailbox, a workgroup, or an AEP (Application Endpoint).
   
   Agents can choose a target from the **Transfer** window, or by dragging a contact from the Lync/Skype for Business client and dropping it into the contact list area.
Consultative Transfers

Agents can perform consultative transfers to either a PSTN number or to a Lync/Skype for Business user endpoint. Other types of targets, such as a workgroup, an IVR tree, a voicemail mailbox, or an application endpoint (AEP), are not supported.

To perform a consultative transfer,

1. The agent first initiates a new call using the Lync/Skype client. Initiating a new call will automatically place the original call on hold.
2. After discussing the call with the target party, the agent then returns to MaxAgent, right-clicks the call on hold, and selects Consultative transfer.
3. The agent then chooses the target from the list and clicks Transfer.

MaxSupervisor Enhancements

MaxSupervisor users now log in using a UPN and a Windows domain password.

- The agent’s Direct Call activities are now shown in Workgroup View > Agent Statistics.
  - Total Direct Inbound Answered and Total Direct Outbound Connected.
  - Each category contains two subcategories: Total Talk Time and Average Talk Time.
- A new column in WG view and Agent view shows the media type of the session (chat or voice).
- The DNIS column changes to DNIS/URI.
- Display agent’s incoming chat statistics, including Total WG Answered, Total Chat Time, Average Chat Time
- Display agent’s chat Wrap Up statistics, including Total Number of Wrap-Up, Total Wrap-Up Time, and Average Wrap-Up Time
- Form data HTML page can be viewed by clicking MaxSupervisor’s queued call entry or by clicking agent’s chat state entry
- Display number of concurrent chat sessions for each agent

MaxInsight Enhancements

MaxInsight users now log in using a UPN and a Windows domain password.

VRLManager Enhancements

Recording file media format WMA 16kps Mono is now supported.
Windows 10 Client Support

In addition to MaxCS Administrator, the following MAXCS client applications now support Windows 10:

- MaxAgent
- MaxSupervisor
- MaxInsight

Parameters from Release 6.5.8 No Longer Available

With the move to a UCMA architecture, various configuration parameters no longer apply. Following is a list of these parameters, organized by the Release 6.5.8 menus:

- **System > General**
  - Country
  - System Call Park
  - Operator
  - Mediation Server Address
  - Dialtone Pilot Number

- **System > Number Plan**
  - Extension Length
  - Default Password
  - First Digit Assignment

- **System > Call Restriction**

- **System > Country Relevant**

- **System > Audio Peripheral**

- **System > Softswitch Component**

- **Voice Mail Configuration**
  - Message Management options
  - Recording options
  - SMTP/POP3 options
  - Voicemail distribution list

- **Application Extension Configuration**

- **Trunk Configuration**

- **Out Call Routing**

- **Extension > General**
  - DID Number (Line URI read-only)
- E911 CID
- Description
- Department
- Language
- IP Extension

In the Lync Agent section
- Consolidated Assign Agent License and Enable Agent into one parameter
- SIP URI and Line URI are read-only

- Extension > Mail Management
- Extension > Notification
- Extension > Restriction
- Extension > Answering
  - Call Forwarding
  - Call Handling

- Unassigned Extension Number Configuration
- SIP Device Configuration
- Line Park Configuration
- Workgroup > Mail Management
  - Assign Exchange Integration License
  - SMTP/POP3
  - Mail Forwarding options
  - Message Playback options
  - Capacity
  - Press '0' options

- Workgroup > Queue Management
  - Application Extension Queue Control
  - Basic Queue Overflow Forwarding and Basic Quit Queue Option are replaced with Advanced Queue Overflow and Queue Prompt features

- MaxCall Configuration
- VoIP > Enterprise Network Management
Operational Limitations

Please note the following limitations with this release:

- When agents make an outbound workgroup call, conference a new member, or perform a consultative transfer, the target MUST be either a PSTN number or a Lync/Skype for Business user. Other types of targets, such as a workgroup, IVR, voicemail, or AEP, are not supported. (You can, however, make an Attended Transfer to a workgroup or IVR.)

- Make sure that Lync/Skype for Business users set the following option in their Lync/Skype client: set Options > Status to: I want everyone to be able to see my presence... Lync/Skype for Business needs to publish presence information in order for MaxACD to determine an agent’s availability.

- When a user first opens MaxSupervisor, it may take a minute for the system to update the agent’s status to Busy when the agent answers a call. This only occurs when MaxSupervisor is opened; subsequent agent calls update the agent’s status within seconds.

AltiGen Technical Support

Authorized AltiGen Partners and distributors may contact AltiGen technical support by the following methods:

- You may request technical support on AltiGen’s Partner web site, at https://mspartner.altigen.com. Open a case on this site; a Technical Support representative will respond within one business day.

- Call 888-ALTIGEN, choose option 5 from the IVR, or 408-597-9000, option 5 from IVR, and follow the prompts. Your call will be answered by one of AltiGen’s Technical Support Representatives or routed to the Technical Support Message Center if outside of normal business hours and no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PST, Monday through Friday, except holidays.

If all representatives are busy, your call will be returned in the order it was received, within four hours under normal circumstances. Outside AltiGen business hours, only urgent calls will be returned on the same day (within one hour). Non-urgent calls will be returned on the next business day.

Please be ready to supply the following required information when calling in for Support:

- Partner ID.
- AltiGen Certified Tech ID.
- Product serial number.
- MaxACD version number.
- Server model.
- Number and types of boards in the system.
- Indicate whether this is a virtual or standalone server installation.
  - If this is a virtual installation, be prepared to identify whether you’re using VMware or Hyper-V, and which version of the virtual software is installed.
- The amount of memory and the number of CPUs that are reserved for MaxACD Server use. Be aware that memory and CPU cores should always be dedicated and reserved for MaxACD Server use exclusively.
- Indicate whether SSD drives are installed. If they are not, be prepared to describe what NAS devices are installed, and whether they are shared or dedicated to MaxACD Server.
- The telephone number where you can be reached.